

GTE ON AIR INTEGRATION

November 17, 2015
Virtual Meeting

REPORT ON THE MEETING

On November 17, 2015, a virtual meeting of the GTE on Air Integration was held with the participation of delegations from Brazil, Colombia, Guyana, Paraguay, Uruguay, Venezuela, IIRSA Technical Coordination Committee, and the Inter-American Development Bank.

The objective of the meeting was to promote discussion and comments regarding the results, recommendations and conclusions of the study on the Guianese Shield Hub air connectivity. Such comments will be incorporated into the final version of this study for approval by the countries.

The meeting was opened by Mr. Rodolfo Osorio, Advisor on International Affairs to the Strategic Planning and Investments Secretariat of Brazil's Ministry of Planning, Budget and Management.

Next, Mr. Andrés Ricover, consultant of the Inter-American Development Bank (IDB), presented the study "Developing Regional Connectivity between the Countries of the Guianese Shield and South America" with the objective of exploring the current level of connectivity between the countries of the Guyana Shield and the rest of South America and determining the main causes for the constraints.

The study showed the large disparity in connectivity between the larger Guyana Shield countries —Brazil and Venezuela— and Guyana and Suriname. The report determined that Suriname and Guyana's limited air connectivity with the rest of South America was due primarily to small populations and a traditional orientation towards the Caribbean and North America. However, this does not prevent future connectivity improvements with South America.

The presentation identified a series of aspects that could influence greater connectivity with South America, especially in the areas of airport infrastructure, the institutional framework of the countries' air sector, the nature of air service agreements with South American countries, and the current and forecasted condition of the air transport market. The primary aspects identified were:

- Air infrastructure does not hinder connectivity for Georgetown and Paramaribo airports even with limited terminal space.
- The institutional framework in the air transport sectors of Guyana and Suriname involves potential conflicts of interest, but this too does not constrain connectivity.
- Guyana and Suriname have strong air service agreements with CARICOM countries. However, Guyana has a restrictive agreement with Brazil, as does Suriname with Colombia. Most

importantly here, neither country is connected to Bogota's large hub with flights to destinations throughout South America.

- The small size of both countries, the small tourism markets, and small GDPs will constrain the destinations and frequencies available in both Guyana and Suriname.

To best achieve the enhancement of connectivity between Guyana and Suriname and the rest of South America, the proposal is to improve connections to nearby hubs, most notably Bogota, Panama, and Port of Spain. Such a solution would allow two small countries to practically achieve a high level of connectivity with the region and the world at large without needing to invest in significant improvements in air infrastructure.

The presentation resulted in a series of comments from attendees to clarify points in the presentation or to make points that were not identified in it. First, the clarification was made that Guyana is not a signatory of the ACS and has a special unit in charge of incidents.

With regard to air liberalization, it was clarified that fifth freedom rights would have little relevance for small, non-hub airports such as those in Suriname and Guyana. There was a comment that air service agreements with Colombia should wait for demand, but it was noted that demand is not a limiter to reach such an agreement, and that it is a good starting point if there is interest in having a Colombian carrier operate on the route. A possible solution would be to fully liberalize the current agreements with Brazil and Colombia.

When looking at the market potential, it was noted that airlines have a good understanding, with electronic systems for all passengers going between any origin/destination pair, and thus will establish a direct flight if feasible. Also, cargo was not looked at in the study as it is driven by the supply of belly cargo space in departing passenger aircraft in most destinations.

Finally, the countries agreed to send their comments on the document not later than **Wednesday, November 25**, for their subsequent incorporation into the study.

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